



## Report to the Commissioners Area IX Agency on Aging, Flathead County March 18, 2019

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On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2017 actuals  
FY 2018 annual targets  
FY 2018 actuals  
FY 2018 actuals as a percentage of annual targets  
FY 2018 actuals as a percentage of FY 2017 actuals  
FY 2019 actuals to date  
FY 2019 annual targets  
FY 2019 actuals as a percentage of FY 2019 annual targets

**The general target is 66.66% for FY 2019, July 1, 2018-February 28, 2019**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

### Data to note:

- Since I did not give a report in February, most numbers in the “Total Last Report” column are highlighted in yellow as they now include data through January 2019.
- **The # of unduplicated clients receiving Independent Living Services** is almost at target for the year as all clients were counted as “new” in July. However, we anticipate serving more individuals this year than originally estimated due to federal fiscal year 2018 funding increases and an increased turnover in clients as we’ve moved to a sliding fee scale system.
- **Outreach/Education** efforts continue above target for the year due to BEC grant related outreach.
- **Meals/Nutrition** - Total meals served are just under target for the fiscal year and just under the pace of last year.
- **Transportation**
  - Total rides are 16% above target for the year due to increases in non-GNP fixed route ridership and seasonal rides within Glacier National Park, despite early closures due to fires.
  - Excluding rides within GNP, we’ve provided 1,844 more rides than this time last year.
  - Rides on our after-school program route have increased this year as ridership to the SPARKS program has grown substantially and we’ve added the Kalispell Parks-n-Rec program to the route on a trial basis. Last year at this time we provided 5,338 rides; this year we are at

13,801 rides, an increase of 8,463 rides. We are currently negotiating a contract with the City of Kalispell to continue these rides in the 2019-2020 school year.

- Rides on the previously underperforming Kalispell fixed route continue to grow on both the AM and PM runs. We are up 1,675 rides on these routes from this time last year. In two months of operation, the new fixed route Orange Line has provided another 1,028 rides in Kalispell, bringing the overall increase in rides to 2,703.
- Our Dial-A-Ride (DAR) service, which now includes paratransit rides in Kalispell plus premium DAR rides in Evergreen and west of Kalispell, continues to provide fewer rides than last year (down about 12%) when all DAR rides were paratransit rides related to the Kalispell/Evergreen fixed route. However, we extended the hours of available service for the premium DAR service at the end of December to provide riders with more flexibility.

▪ **Independent Living Services**

- The “unit of service” numbers are for January, when the target was 58%. We continue to be above target for homemaker and for personal care and below target for the other services. Staff have completed the re-assessment of all IL clients and have begun planning for adding waiting list clients onto service.

▪ **Benefits Counseling**

- We’ve substantially exceeded our target for the year due to our Benefits Enrollment Center grant outreach efforts, a greater than expected number of individuals requesting assistance during Medicare Open Enrollment and the addition of several extra Medicare 101 classes. We expect this pace to continue and are looking at potential staffing changes to better meet the growing need.

▪ **Ombudsman**

- Ombudsman cases continue to be on target, but we may see a decrease over the next few months due to a vacant position.

**AOA Administration**

***Budget and Contracts***

- We completed a county budget amendment at the end of January, but it does not include recent federal funding increases as the final adjusted allocations were not available to us at that time.
- Staff completed and submitted FY 2020 county CIP and budget drafts.
- DPHHS again revised our FY 2019 federal funding allocation, which will require us to do a contract amendment in April. The state recently reduced funding from the original contract amount, but Lisa assisted state staff to find a \$340,000 error, which resulted in a slight increase from the original contracted amounts (instead of a reduction). DPHHS has also revised the projected federal allocation for FY 2020 (as it was based on the same error). We won’t know the state funding allocation until the legislative session concludes. However, we expect at last flat funding for the next biennium.
  - Staff submit financial reports monthly to DPHHS.

***Building***

- Nothing to report.

***HR/Staff Development***

- Commissioners approved the addition of a Veteran-Directed Program Care Coordinator (1.0 FTE), which will be posted shortly.

- Now that we have final confirmation of our annual budget from DPHHS, we are analyzing staffing needs in our I&A/Outreach/Benefits Counseling programs to determine how best to meet the increased demand for assistance. We are anticipating requesting an additional .375 FTE in the short term.
- While most of the federal/state funding increases for transit in FY 2020 will be needed to cover the increase in the cost of employee health insurance, we also anticipate requesting a .75 FTE Dispatcher be increased to a 1.0 FTE to accommodate increased job duties and allow us to better cover our full hours of operation.

### **State/Federal/Legislative Issues**

- Area Plan on Aging
  - The draft of the new 4-Year Area Plan on Aging was submitted to DPHHS on March 15<sup>th</sup>.
  - DPHHS will provide us with feedback on the draft the first week of April. Lisa will make any required changes and submit the Plan to the AOA Council and Commissioners for review.
  - We rescheduled the March AOA Advisory Council meeting to April 11<sup>th</sup> so the Council can vote on the Plan.
  - With Commissioner permission, Lisa will present the Plan to Commissioners for approval/signature on April 15<sup>th</sup>.
- Montana Area Agencies on Aging Association (M4A)
  - M4A advocates for aging services funding and policies that support older Montanans. Priorities for this state legislative session include restoration of the 2.5% state general fund cut to Area Agencies on Aging in the last session, restoration of/new provider rate increases, restoration of funding for other supportive services that older adults depend on like the Office of Public Assistance, adequate funding of Home and Community-Based Medicaid Waiver slots to reduce waiting lists and exploration of options for long-term funding stability for aging services given the rapid rise in the aging population.
    - Update: HB 2 (as passed out of Appropriations) includes an increase of 100 Medicaid Waiver slots but the money would come out of the Older Montanans Trust Fund, which is contrary to the intent of the fund and harms aging services in the long run. The bill does not include additional funding for Area Agencies. We are still in discussion with legislative and executive leadership about options to increase funding for aging services, specifically ombudsman services.
  - Lisa continues to participate on a subcommittee to advise the state on redesigning the Legal Services Developer program that provides federally mandated legal advice and services to older adults. The Committee met via conference call on 2/21/2019.

### **AOA Advisory Council**

- The next meeting will be April 11<sup>th</sup> to review and vote on the new Area Plan on Aging.
- Partners of the AOA met on 2/26/2019.

### **Outreach/Education/Media**

Note: Transportation related outreach is noted in the Eagle Transit section below.

#### *January*

- 1/7/19, monthly interview on KGEZ, 15,000
- 1/16/19, Daily Inter Lake, promotion /article about public meeting for the Area Plan, 17,500
- 1/18/2019, presentation to NARFE (retired federal employees) group, 12

- 1/22/19, Medicare 101 class/BEC presentation, 10
- 1/22/19, public meeting to gain input on new Area Plan on Aging, 37
- 1/22/19, Daily Inter Lake article, "Agency on Aging meeting to shape new plan", 17,500
- 1/23/19, Daily Inter Lake article, "Learn about Alzheimer's, dementia through local courses," 17,500
- 1/27/19, Daily Inter Lake editorial, "Agency on Aging helps ease the stress of aging," 17,500
- 1/27/19, interview on KLOVE radio, 17,000
- 1/29/19, outreach/assistance re. 2EC tax credits at Kalispell Senior Apartments, 9
- 1/29/19, participation in "Coalitions of Coalitions" meeting, 35
- 1/30/19, Flathead Beacon, "County begins work on New Aging Plan," 20,000
- January 2019, hosting weekly training on Alzheimer's/dementia

#### *February*

- 2/4/19, monthly interview on KGEZ, 15,000
- 2/4/19, BEC outreach/2 EC assistance at Centre Court Apartments in Kalispell, 18
- 2/6/19, BEC outreach/2 EC assistance at The Elms in Kalispell, 10
- 2/11/19, BEC outreach/2 EC assistance at Whitefish Manor, 13
- 2/12/19, BEC outreach/2 EC assistance at Mountain View Court in Columbia Falls, 6
- 2/20/19, Flathead Beacon, "The Changing Nature of Grandparenting," 20,000
- 2/26/19, Medicare 101 class, 15

#### **Age-Friendly Flathead**

- The next meeting will be in April or May, date TBD.

#### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - We received notice of an adjustment in our FY 2019 state TransADE funding from \$75,556 to \$89,246, an increase of \$13,690. TransADE is revenue from rental car fees that supports transportation for older adults and people with disabilities. The amended contract is on the agenda today for signature.
  - Commissioners approved on 2/29/19 and we electronically submitted on 2/22/19 the Annual Transportation Coordination Plan (TCP), 5311 Application and Capital Request.
  - 5-Year Transportation Development Planning Grant
    - Staff met with stakeholders on 2/13 to discuss potential options to increase the availability of medical rides in the Valley.
    - The Planning Committee met on 2/20.
    - The consultant on our plan is now focusing on helping us develop possible solutions for Evergreen and a potential restructuring of our Columbia Falls and Whitefish routes/services.
    - Transportation Manager Tom Schneider met with Whitefish City planning staff on 2/11 and 2/21 about partnering on potential transit projects. Tom presented at a public input meeting on March 11<sup>th</sup>.
  - Second quarter financial, program and vehicle reports were submitted at the end of January.
- Outreach/Education/Media/Special Events:
  - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in January and February.

- We promoted the January and February TAC meetings in the Day Book and other community calendars.
- We ran ads in the Flathead Beacon in January and February about the new Orange Line and “Fare Free February.”
- On 1/9/19, the Flathead Beacon published an article, “Eagle Transit Expands Service in Kalispell.”
- On 1/16/19, Tom did an interview on KGEZ about the Orange Line and Fare Free February.
- On 2/17/19, the Daily Inter Lake published an article, “Eagle Transit eliminates Evergreen stops.”
- On 2/27/19, the Daily Inter Lake published an article, “Whitefish transit meeting March 11.”
- Operations:
  - Orange Line: In the first two months of operation, we provided more than 1000 rides on the line and have received a lot of positive customer feedback. (This is more than 4 times the number of rides we were providing on the Evergreen Commuter.)
  - “February Free”: We offered free rides in February on all our fixed and commuter routes to encourage people to ride the bus generally and to try the new Orange Line. February is often a lower ridership month due to weather and fewer days of operation. We provided 1,112 more fixed route rides this February than last (excludes after school routes).
  - We have received one new 13-passenger bus and are about to receive another that were approved for FY 2019.
- Transportation Advisory Committee (TAC)
  - The next TAC meeting will be April 4<sup>th</sup> at our new standing meeting time of 2:00-3:30 pm.
- Glacier National Park
  - We are working on operational and budget details for the upcoming summer season.

### **Nutrition**

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- We are having our annual volunteer appreciation luncheon on May 4<sup>th</sup>.
- We’ve set the annual Older Americans Day picnic for Friday, June 14<sup>th</sup>.

### **I & R/Assistance/Ombudsman/Independent Living Services**

- Veteran Directed HCBS Program
  - We are in the process of transitioning the program from Area VI and have revised our completion date to coincide with the beginning of the fiscal year.
  - Commissioners approved and we will soon post the Care Coordinator position.
  - We plan to engage 406 Financial Services as the fiscal agent that assists veterans to fulfill their responsibilities as the employer of their attendants (like payroll and tax withholding/reporting). We will have an MOA ready soon for your review/approval.
  - Monthly fees paid to us by the VA will cover the cost of staff and program overhead.
- Independent Living Services:
  - We have completed the reassessment of existing clients and will soon review those on the waiting list to determine how many we can bring onto service.
- Benefits Enrollment Center grant
  - We continue to work with IT to launch a new AOA website.

### **Senior Mobile Home Repair**

- The Advisory Board met on February 13<sup>th</sup> and March 13<sup>th</sup>. The next meeting will be 4/10/19 at 10:00 am at the Flathead Builders Association board room.
- Six projects were completed in February; 4 were in progress. Minutes from the March meeting are not yet available.
- In consultation with Finance and HR, we have determined it would be best for the SMHR program to find a new fiscal host. This will reduce the administrative burden on the county and allow the program to have more flexibility. We've asked the volunteer advisory committee to find a new host by the end of this fiscal year and they are working to do that.
- Commissioners approved the Montana Department of Commerce HOME/Senior Home Repair Program Income Plan on March 12<sup>th</sup> which will allow Flathead County to transfer lien funds from the AOA's discontinued HOME program to CAPNM's HOME program to benefit senior home owners in Flathead County.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- The annual contracts have been approved and signed by all of the senior center boards.
- The Whitefish Community Center is currently hosting an Alzheimer's/dementia training series. It has been promoted in the Daily Inter Lake.



# March 2019 Report: Performance Measures Tables - February 2019 stats (FY 2019)

66.66%

MEASURE	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	Feb	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
# Receiving Independent Living Services	178	233	110	47%	62%	0	95	95	98	97%
# Receiving Meals on Wheels	470	465	374	80%	80%	20	300	320	465	69%
# Seniors Receiving Congregate Meals	1,785	1,000	1,404	140%	79%	65	1,163	1,228	1,200	102%
# Eagle Transit DAR Unduplicated Riders	401	500	331	66%	83%	not yet available	274	274	450	61%
% of Service Recipients at Moderate to High Risk of Institutionalization	89%	88%	92%	105%	103%	90%	90%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.89	\$6.75	\$6.29	93%	91%	\$6.52	\$6.32	\$6.52	\$7.00	93%
% Overall Satisfaction with AOA Services from Annual Survey	N = 99%, IL = 96%	95%	N=97% IL=90%			N/A	N/A		95%	
Maximum annual number of transportation complaints	30	36	12	33%	40%	4	0	4	36	11%
WORKLOAD INDICATOR	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	Feb	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
<b>Outreach/Education/Media</b>						Feb				
Public Outreach/Education/Media Efforts	123	120	116	97%	94%	7	82	89	120	74%
<b>Nutrition</b>						Feb				
Total Meals	82,428	79,000	80,639	102%	98%	5,923	45,005	50,928	80,000	64%
MOW	49,695		47,409	N/A	N/A	3,744	26,209	29,953		
Congregate	32,733		33,230	N/A	N/A	2,179	18,796	20,975		
Nutritional Assessments Conducted	2,424	1,550	1,846	119%	76%	101	1277	1,378	2,000	69%
<b>Transportation</b>						Feb				
Total Ride Count	85,305	90,000	99,104	110%	116%	9,586	65,122	74,708	90,000	83%
Dial-A-Ride Count	30,025	30,000	31,645	105%	105%	2,149	15,996	18,145	30,000	60%
City, Commuter and Other Ride Count	55,280	60,000	67,459	112%	122%	7,437	49,126	56,563	60,000	94%
Eagle Transit Outreach/Special Events	40	15	42	280%	105%	5	24	29	24	121%
<b>Information and Referral/Assistance</b>						Feb				
Info and Referral/Assistance Contacts	17,523	18,000	19,429	108%	111%	2,297	15,955	18,252	18,000	101%
<b>Independent Living</b>			93%			Jan			58%	42%
Homemaker Units of Service	784	2,500	2,005	80%	256%	128	722	850	1,324	64%
Escorted Transportation Units of Service	792	1,739	2,314	133%	292%	76	450	526	1,391	38%
Respite Units of Service	992	2,468	2,079	84%	210%	116	1062	1,178	3,250	36%
Community Support/Senior Companion Units of Service	1,060	1,353	1,310	97%	124%	41	333	374	1,176	32%
Personal Care Units of Service	358	435	231	53%	65%	12	71	83	65	128%
<b>Benefits Counseling</b>						Feb				
Benefits Counseling Hours of Service	600	450	502	112%	84%	90	862	952	450	212%
<b>Ombudsman</b>						Feb				
Ombudsman consults/cases opened	1034	1,100	1,250	114%	121%	47	684	731	1,100	66%